THE IMPORTANCE OF A COMPREHENSIVE SEQUENTIAL ORIENTATION PROCESS:
Preparing New Clinical Staff for the Challenges of Home Care in 2015 & Beyond…

Presented by
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METROWEST HOMECARE & HOSPICE
TENET HEALTH

“Hospitals are but an intermediate stage of civilization [sic]…
the ultimate objective is to nurse all sick at home”

Florence Nightingale
The Times London, April 14, 1876
Objectives

- Understand the importance of why a homecare agency needs a formal and consistent orientation program in preparing new clinical staff.
- Discuss examples of Resources available to support the Orientation Program.
- Understand the importance of forging a Staff/Agency Partnership from Day One.
- Describe the components of a Sequential, Comprehensive Orientation Program to develop and retain Staff.

Why does a home care agency need a formal orientation program?

- Guarantee that all orientees are provided with the same foundational information
- Guarantee consistency in education and training using evidenced-based best practices
- Establish a culture of accountability and community between the agency and the new employee
Who are you Orienting?

- Registered Nurses
- Licensed Practical Nurses
- Physical Therapists
- Occupational Therapists
- Speech Therapists
- Home Health Aides
- Social Workers

Where do they come from?

- Other Home Health Agencies
- Hospitals
- Long Term and Short Term Skilled Nursing Facilities
- Other Hospice Agencies
- Doctor’s Offices
- Rehabilitation Centers or Outpatient Clinics
- Returning to the work force
The Importance of a Comprehensive Sequential Orientation Process

Issues new hires may not understand about home care

- Easier than previous work experience
- Not understanding current acuity in the home care population
- Complexity of procedures done in home: wound care, wound vabs, pleurex cathethers, infusion therapy
- Depth of assessment skills needed
- Overall case management accountability
- Travel, weather and time management challenges

Past is Prologue

*Looking at the Past helps you Plan for the Future*......

- Bringing together Orientation stakeholders
- Identify Outdated Orientation components
- Identify Needs of New Staff for Preparation for Home Care in 2015 and beyond
- Identify and Keep things in the Current Orientation Program that work well
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Stakeholders
New Orientation Work Group

- Agency Executive Director
- Director of Quality and Performance Improvement
- Interdisciplinary Team Clinical Managers
- Orientation Manager/Documentation Specialist
- Special Projects Manager
- Clinical Staff Representatives: Nursing and Rehabilitation
- Human Resources Manager
- Assistant to Executive Director
- Corporate Compliance Officer

Identify Outdated Orientation Components

- Review of ALL documents utilized in previous Orientation Process
- Remove all outdated Regulatory, Policy and Procedure documents
- Replace with most current documents
- Develop Discipline Specific Documents for all Clinical New hires
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Identify and Keep things in the Current Orientation Program that work well.

- Red Carpet Welcome
- Introduction and sit down meeting with all office staff
- First week Home Care visits with Preceptor
- Weekly progress outline for 12 week Orientation period
- Clinical Manager support and guidance

Identify New Staff Needs in Preparation for Home Care in 2015 and Beyond....

- Current and Accessible Home Care Specific educational resources
- Current and Accessible Home Care Specific Procedures and Competency Documents
- Agency Specific Software Education
- OASIS Documentation Education
- Home Care Specific Education in CMS Rules and Guidelines
- Prepared Preceptors
- Designated orientation program manager-someone who takes ownership of the program overall
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**Tenet Post-Acute Home Health & Hospice Orientation Program Components**

- Program specific documents in discipline specific format
  - Homecare vs Hospice
  - Differentiation of discipline roles – RNs, LPNs, Therapists, Aides
- Guidance for the Orientation/Onboarding Process for New Employees
- Clinical Orientation Program Booklet
- Preceptor Orientation Checklist
- Skilled Nursing Checklist - self assessment
- Clinical Competencies Checklist
- Preceptor Orientation Program
- Development of Orientation Manager role with oversight responsibility for all new clinical staff

**Clinical Orientation Program Booklet**

- **Clinical Orientation Booklet** defines and outlines Goals and Tasks accomplished in a Weekly Sequential Format over the twelve week Orientation period
- Clinical Orientation Booklet includes documentation of completion of specific tasks, signed off by preceptor and orientee and monitored by designated Orientation Program Manager
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Preceptor Role

- Preceptors will go through Preceptor Orientation Program
- Preceptor will act as example and resource for the New Orientee in the delivery of Home Care Services at the agency
- Preceptor will act as an example and resource for Patient and Physician interactions.
- Preceptor will participate in assessment of New Orientee Progress during the Orientation Process.
- Preceptor will update checklist with Orientee on a weekly basis

Components of Orientation Weekly Checklist

- Components of Each Orientation Weekly Checklist may include some or all of the following:
  - Manager/Preceptor/Orientee Meetings
  - Home Care patient assignment progression/observation through independence
  - Scheduled meetings with office staff
  - Assigned interactive web-based learning modules
  - Skills & competency evaluation
  - Software documentation training with Preceptor and Educator
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Example: Week 1 Orientation Booklet

<table>
<thead>
<tr>
<th>WEEK 1</th>
<th>Manager &amp;/or Responsible Staff</th>
<th>Orientee</th>
<th>DATE/Completed</th>
<th>N/A</th>
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</thead>
<tbody>
<tr>
<td>Meet with Manager</td>
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<tr>
<td>Manager Conducts Office Tour / Walk Thru – Meet &amp; Greet all Office Staff</td>
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<tr>
<td>Orientee receives Weekly Calendar</td>
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<tr>
<td>Meet Preceptor</td>
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<tr>
<td>Receive IT Supplies / Use Instructions:</td>
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<tr>
<td>Cell Phone</td>
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<tr>
<td>Laptop / VPN Wireless Synchronization</td>
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<tr>
<td>HCI Learning Module Access</td>
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<tr>
<td>Password Set-Up</td>
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<tr>
<td>HCI Webinar Learning Modules (Required):</td>
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<tr>
<td>Home Care Basics (60 min)</td>
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<td>Home Health Covered Services (60 min)</td>
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<tr>
<td>PPS Basics (60 min)</td>
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<tr>
<td>Regulatory / Compliance – Refer to Program List</td>
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<tr>
<td>Access to Clinical Procedure Manual</td>
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<tr>
<td>Complete Skills Checklist (Nursing)</td>
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<tr>
<td>Clinical Skills Competency</td>
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<td>Clinical Skills Competency</td>
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<tr>
<td>Computer Documentation Training - Ongoing</td>
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<tr>
<td>Scheduled Meetings:</td>
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<tr>
<td>Manager / Orientee &amp; Preceptor Meeting</td>
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</table>

Why the Weekly Sequential Format is Important

• Learning is presented beginning with FOUNDATIONAL information

• WEEKLY FORMAT:
  o Prevents the Orientee being overwhelmed with too much information
  o Allows for better control and oversight of the Orientation Process

• Weekly format allows for ongoing Preceptor, Educator, Clinical Manager and Orientee identification of Orientee strengths and learning needs
Human Resources & IT Coordination

• HUMAN RESOURCES
  o Notification from HR of discipline, start date of new hire and how many
    hours they will be working weekly
  o Human resources prepares Orientation Booklet and other agency-specific
    documents

• INFORMATION TECHNOLOGY
  • Confirm set-up and delivery of the following:
    ▪ Cellular phone
    ▪ Laptop
  o Arrange time for orientee to sit with IT specialist to:
    ▪ Learn how to use VPN for wireless synchronization
    ▪ Learn how to access HCI learning modules and
    ▪ Set-up Passwords for phone and laptop

Employee Engagement

• Orientee is introduced to Tenet’s commitment to employee engagement

• There is a positive correlation between employee engagement and patient satisfaction

• Some examples:
  o Roll out the “Red Carpet” & Welcome Board
  o Great Expectations!
    ▪ Plan fun employee engagement events
    ▪ Implement ideas to improve HHCAHPs
  o High 5’s, KUDOS & Shining Stars Board
Current and Accessible Home Care Specific Resources

- **Home Care Institute**
  - Web-based interactive education resource
  - Industry specific Educational Modules
  - Provides:
    - Ready made Patient & Family Teaching Tools
    - Ready made Staff Education Tools
  - Easily accessible to staff.

- **BRIGGS: Clinical Procedure Manual**
  - Includes:
    - Step-by-step clinical procedures specific to homecare & hospice
    - Competency Testing and Clinical Skills Checklist
  - Easily accessible to staff
    - Hard-copy manual in office & on server for anytime electronic access

*Note: There are many excellent resources available – HCI & Briggs are just 2 examples and the best fit for our organization.*

Orientation Program Manager as MENTOR

- Primary Responsibility for Guiding the new Clinical Staff through the Orientation Process
- Contacts new hire week before start date to congratulates and welcome him/her to agency and confirm work schedule
- Enters Orientation Specific Assignments on the Orientee schedule
- Collaborate with the Orientee, Preceptor, Scheduler and Clinical Manager on Orientee weekly progress, identifying strengths and areas for learning growth
- Provide OASIS and other homecare documentation education
- May assign additional HCI learning modules as needed
- Act as Mentor throughout Orientation Process
  - Provide non-judgmental guidance and support for questions or problems that may arise with any new hire.
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Documentation Education

Why is the Documentation/Education Specialist role important to the orientation process?

• Understanding homecare documentation and documenting correctly impacts so many areas of home care including:
  ▪ Capturing patient acuity
  ▪ Development of an accurate plan of care that validates acuity
  ▪ Case mix weight
  ▪ Reimbursement
  ▪ Reported quality outcomes

Creating the Orientation Schedule

• Create weekly schedule to include required meetings and HCI learning modules
• Inform clinical managers of time available for field visits
• Provide and review the weekly schedule with orientee, preceptor and clinical manager

Provide orientee with blank weekly calendars for them to fill in and for easy visual of their schedules
Orientee Feedback on our New Orientation Program

Positive feedback received about these components:

- ✓ HCI learning modules
- ✓ Meeting office staff and learning everyone’s role
- ✓ Weekly sequential format
- ✓ Comprehensiveness

Program Review

- Annual review of Orientation Program and HCI Education Modules
  - Reviewed by Corporate Education & Orientation Committee
  - Get feedback from past orientees as to what worked well and what did not
  - Evaluate if education modules are current and applicable
  - Update regulatory and compliance education for current year

- Always a “Work-in-Progress” for improvement
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